



# GENERAL INFORMATION

## TRS BENEFIT RECIPIENTS

### Benefit Payments

Under the statutes governing Montana Teachers' Retirement System (TRS), monthly benefits are payable on the last day of each month; however, these monthly benefits are either electronically deposited to your account or mailed to you on the last business day of each month.

**Note:** If you have not yet signed up for electronic deposit — a convenient, private, reliable, and safe service — you can download the [ELECTRONIC DEPOSIT APPLICATION \(TRS FORM 114\)](#) from our website or call TRS to have the form mailed to you. This form will allow you to authorize TRS to deposit your monthly benefit to the financial institution of your choice.

### Mailing Address

TRS does not allow the U.S. Postal Service to forward mail sent out by this office. If we do not have your correct address, mail will be returned to TRS. It is imperative that you notify TRS — in writing — of all changes to your home mailing address, even if you receive your benefit payments by direct deposit. You can download the [CHANGE OF MAILING ADDRESS \(TRS FORM 116\)](#) from our website or call TRS to have the form mailed to you.

Having your current address on file ensures prompt delivery of year-end tax forms, notices, and other correspondence regarding your benefit. TRS requires that you submit your change of address in writing in order to safeguard your information and for TRS audit purposes.

### Release of Account Information

For your added protection, information regarding your account may only be provided to you, unless your signed Authorization for Release of Information (TRS Form 136) is on file with TRS. This form authorizes TRS to release your information to another person or entity. The form allows you to specify the particular type of information that TRS can release.

TRS will also accept legal documents including power-of-attorney papers, conservator papers, and guardianship papers.

### Account Value

Please note: if it is necessary for the parties in a dissolution to determine the present value of future retirement benefits, the parties must engage an actuary and/or accountant to determine the present value. TRS will not make such determinations.

### Social Security Number

TRS requires you to provide your Social Security number when completing certain TRS forms. We will use your Social Security number as a reference number to ensure that any funds disbursed under your account are correctly reported to the Internal Revenue Service (IRS). The Internal Revenue Code (IRC) allows TRS to request your Social Security number (*IRC Sections 6041(a) and 6109*).

TRS will never disclose your Social Security number, unless required by law.

### TRS Contact Information

If you have any questions regarding the information presented here, please contact TRS

<i>Call</i>	(866) 600-4045   (406) 444-3134
<i>Write</i>	PO Box 200139, Helena MT 59620-0139
<i>Fax</i>	(406) 444-2641
<i>Email</i>	trswebadmin@mt.gov
<i>Website</i>	trs.mt.gov